

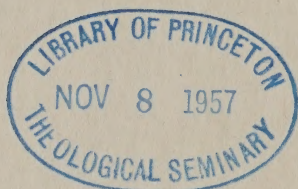
**how
to
DEVELOP
BETTER
LEADERS**

by **MALCOLM & HULDA KNOWLES**

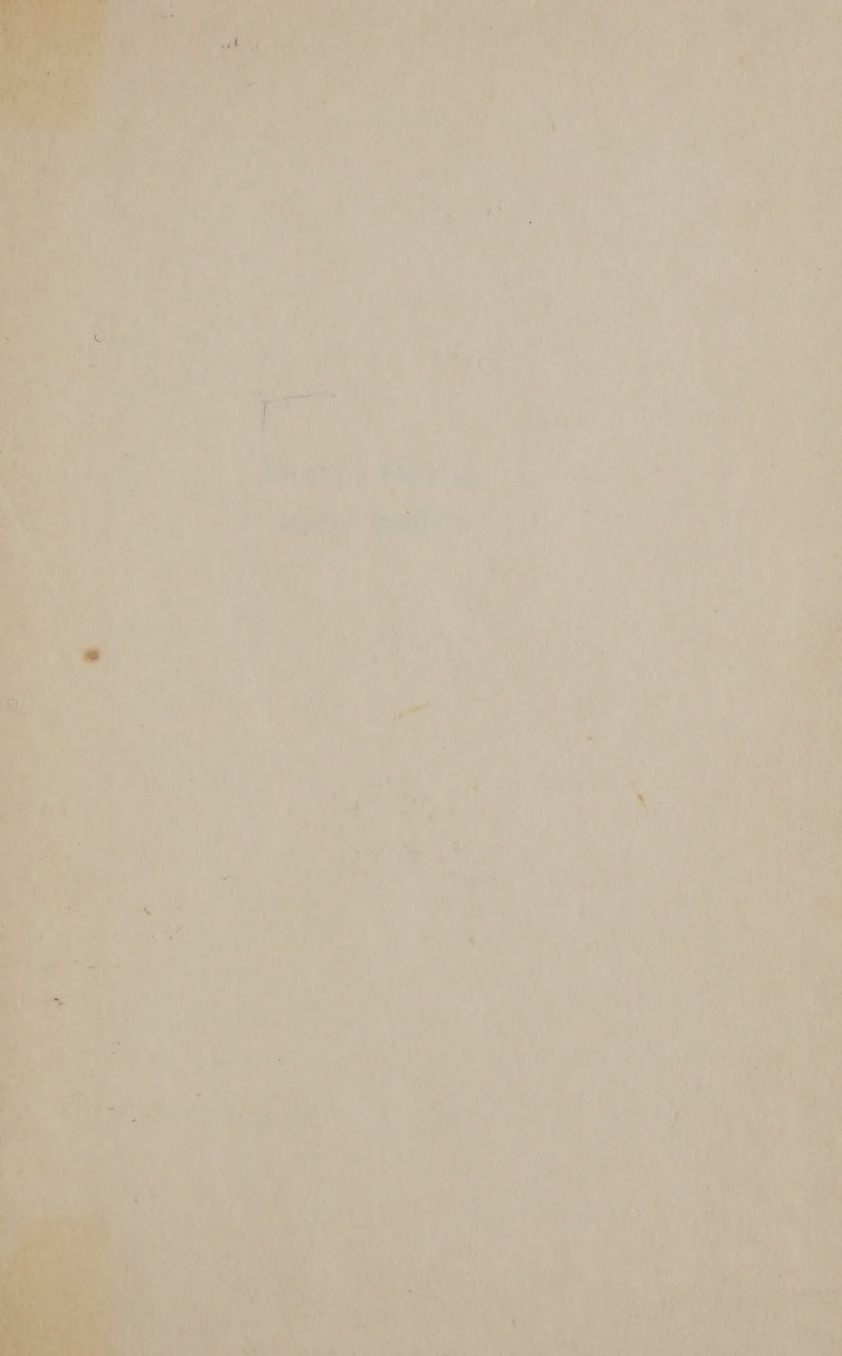


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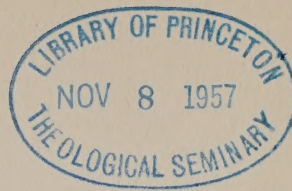
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**how to develop
better leaders**

how to

Association Press, New York



DEVELOP BETTER LEADERS

by MALCOLM and HULDA KNOWLES

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a new look at leadership

Since men first started banding together in wandering tribes they must have been concerned about the nature and development of leadership. In the literature of the world, from before Plato to last week's Sunday supplement, questions have been repeatedly raised about "What is leadership?" "What makes good leaders?" "How can we discover future leaders?" "How can we train better leaders?" and even, "Do we need leaders?" ✓

These questions are still very much in the minds of the leaders and members of the church down the street, the YMCA or YWCA around the corner, the PTA, the business firm in town, the farm organization in the village, the school, the women's club, the labor union, the government, and the United Nations. Indeed, every organization that depends on getting people to work together recognizes that leadership is its most serious problem, its chief asset or liability. ✓

in transition to the scientific era

Leadership development has always been a serious concern to society, but it has never received the attention from scholars and scientists that it is receiving today. Recent investigations of leadership have, in fact, brought us to the brink of a transition from what might be called the pre-scientific to the scientific era of leadership development. ✓

The pre-scientific era was an era of folk wisdom. It

relied on experience, intuition, and artistic practice to provide the principles and methods for developing leaders. Leadership was defined as a highly personal role, with the leader carrying full responsibility for the direction of his followers. Individuals were sought as leaders, therefore, who had such God-given characteristics as personal magnetism, energy, decisiveness, and the like, which were thought to be prerequisites to successful leadership. Training programs were designed merely to provide the leader with the necessary knowledge and skill to round out his personal equipment with reference to a particular job.

The scientific era, by contrast, is an era of questioning, testing, and measurement. It relies on controlled experiment, objective observation, and statistical methods of research to provide a body of knowledge from which the principles and methods of leadership development can be derived. Leadership is defined in the scientific era as a set of *functions* rather than as a personal role. The tools of social science, although still relatively primitive, are dissecting leadership into its many elements and functions and helping us to understand what is required for most effective operation under various conditions. With the emergence of this new knowledge many of the old established doctrines and ways of behaving, with which we have long been comfortable, are being challenged. And a radically different approach to leadership training is being developed.

scientific investigation of leadership

The social scientists first became interested in the systematic study of leadership in the second decade of this century. The early studies were concerned

largely with trying to describe accurately the common occurrences and structural elements of organizations and the traits of leaders. During the next two decades the tools of psychology, sociology, anthropology, social work, education, and psychiatry began to be used in the study of every aspect of group leadership and operation.

A notable turning point in this line of investigation was the classic studies in the 1930's by Lewin, Lip-pitt, and White, of the effects of experimentally created group climates on the behavior of groups and their members. These studies demonstrated that certain variables in group life, such as "social climate" and "leadership style" can be manipulated in experimental settings and that their effect on other variables, such as productivity and interpersonal relations, can be quantitatively analyzed. In these studies Kurt Lewin and his associates discovered that *democratic* leadership, in which the leader helped the group to organize itself and to make its own decisions proved in the long run to produce the best results in terms of things accomplished, co-operative relationships, and personal growth. The groups under *authoritarian* leadership, in which the leader maintained rigid direction and control, produced less over a period of time, and encountered a great deal more friction and frustration. The groups that scored lowest on all counts were those under *laissez-faire* leadership, in which the leader remained comparatively passive.

Since these early studies an increasing number of aspects of group life have been subjected to scientific study. Some studies have focused on the "socio-metry," or interpersonal relations in groups. Others have concentrated on the different ways groups are

organized, the emotional aspects of group life, the structure of power among group members, the decision-making process, patterns of communications, and leadership-membership functions. This research has been carried on under a wide variety of auspices, including the armed services, business and industry, social agencies, religious organizations, government, and the universities. Probably the largest volume of systematic research today is taking place in a number of special laboratories in universities, such as the Research Center for Group Dynamics at the University of Michigan, the Human Dynamics Laboratory at the University of Chicago, the Department of Social Relations at Harvard, the Human Relations Center of Boston University, and similar programs in almost a dozen other universities.

some results of research

Perhaps the most basic development growing out of recent research is a changing conception of the nature of leadership. When the social scientists started observing groups at work and tabulating incidences of leadership behavior, they found that the things that leaders do were being done by many members of the group; in other words, that "leadership behavior" was not the special property of any one person. Leadership, therefore, is now defined as a set of functions, in contrast to its traditional definition as position or personality.

This new conception does not deny that there are leaders. It does eliminate the sharp distinction between *leaders* and *followers* that is so prominent in our folklore; for objective studies of groups in action repeatedly show that while at one point of time one member of the group may be performing a leadership

function and the other members are in the role of followers, at another point of time a different member is performing a leadership function and the first member is in the role of follower. Indeed, the evidence is overwhelming that in many situations the more widely leadership functions are shared among all members of a group the more efficiently and co-operatively they work together. Each member can then contribute his own unique talents and knowledge in accomplishing the common goal.

Another important result of recent research is the insight that a group is a dynamic, growing organism with different leadership needs at different stages of development. Every group starts out in an infantile stage, regardless of the maturity of the individuals in it. Like a child, it is dependent on the guiding hands of parent figures (leaders). It looks to them to help it define its goals, organize its work, coordinate the efforts of its members, and even discipline misbehavior.

A later stage of development, like that of an adolescent, is characterized by the conflict between the desire for independence and the fear of leaving the protection of a guiding hand. A group in this stage will frequently disagree with its leader and may overrule him.

When a group reaches maturity it functions as a well-integrated, independent organism. It accepts responsibility for its own actions. It faces its problems and solves them objectively. It divides its tasks among its members in keeping with their abilities. It organizes its procedures according to the requirements of each situation. The members of a mature group have shifted the center of their attention from their personal concerns (such as their status in the

group) to the group's concerns (such as making a decision that will be in the interest of all).

The competent leader will understand this process of natural growth and will do whatever is necessary to assist the group toward maturity. The leader who does not understand the process or who refuses to give up his authority or "lose control" can easily keep a group in an infantile state, completely dependent on him. On the other hand, a leader to whom permissiveness is a rigid principle can seriously retard the development of a group by failing to give it the kind of assistance it needs.

a new role for the leader

A new conception of the role of the designated leader seems to be emerging from this line of thinking. Emphasis is shifting away from the notion that the leader is one who plans for, thinks for, takes responsibility for, and directs other people, toward the notion that the leader is primarily a convener, trainer, and co-ordinator for a group. His central function is coming to be seen as helping the group learn to decide and act for itself more efficiently. In his role as trainer the leader can perform several unique services:

The leader helps to establish a "social climate." If he regards himself as superior to other members of the group and therefore starts bossing them around, he will produce an atmosphere of competition and hostility, formality and reserve, criticism and blame. If, on the other hand, the leader regards himself as a co-worker who has certain specialized functions, and if his attitude toward the other members is one of deep respect for their integrity and worth, he will produce a climate of friendliness and co-operation,

informality and freedom. These attitudes produce an atmosphere in which the group can develop a mature group personality characterized by democratic unity and the mutual sharing of responsibility.

The leader helps the group to organize itself. He takes special responsibility for being sensitive to the need for definition or clarification of goals and purposes. He sees that the members build their agenda and plan their work co-operatively. He helps them identify the tasks that need to be performed and organize committees and individuals to perform them.

The leader helps the group to determine its procedures. Efficiency of operation requires orderly procedures for making decisions and doing other work. The standard method of solving this problem, that of parliamentary procedure, is often too formal and rigid for most needs of democratic groups. The leader, therefore, helps the group to analyze each situation and determine what procedures will best meet its requirements. In one situation, a decision may be reached most efficiently through general discussion and consensus. In another, it may be preferable to divide into small subgroups. In a third situation the testing of conflicting ideas through role playing (see page 51) might be the most rewarding procedure. The group should be able to look to the leader as a procedural technician.

The leader keeps responsibility for making decisions wholly with the group. Though the leader is always free to raise questions and make suggestions, he never allows himself to be put into the position of making decisions for others. He recognizes that the group has a right to make mistakes and will

mature only if it learns to take full responsibility for its own decisions and actions.

The leader helps the members of the group to learn from their experience. By developing the habit of looking not only at *what* they do but *how* they are doing it, members of a group can improve their ways of working together. The leader has a special responsibility to train the group as a unit to become aware of the *processes* as well as the *content* of its work, and to evaluate these processes objectively so that it can improve on them.

new dimensions for leadership training

The added knowledge we now have about the nature of democratic leadership seems to suggest that leadership training is not the simple one-dimensional undertaking we have traditionally thought it to be. To develop fully competent leaders we now have to work in three dimensions.

The first dimension has to do with training in the particular knowledges and skills required for particular jobs, such as being chairman of particular committees, leading particular discussions, teaching particular subjects or managing particular organizations. This is the dimension with which we are most familiar and in which most leadership training is going on.

The second dimension consists of developing generalized understandings of group behavior that are applicable to *all* groups in *all* situations. This second dimension might be thought of as the "liberal arts" program in leadership development whereas the first dimension is more akin to the "vocational training" aspect of leadership development.

The third dimension consists of training all group

members, not just the designated leaders, to be able to perform leadership functions. It recognizes that in many respects the most effective training is done with the group as a whole and in terms of its continuous experience.

It is now apparent that a complete leadership training program in any organization must be concerned with all three of these dimensions.

individualism and the group

Fears are sometimes expressed about the danger of too much emphasis on training for participation in groups, with the possible consequence of restricting individualism, independence, creativity, and privacy. Without doubt there are many times when an individual must perform alone because the situation requires it, and there are other times when an individual needs creative solitude for the good of his own soul.

✓ But in our complex and interdependent world there are many things we cannot get done alone. And then we must get together in groups to accomplish the things we as individuals want. This book is concerned with the development of leaders for those groups, leaders who will be sensitive to the unique qualities, resources, and potentialities of all the members of a group, leaders who will enable each member to contribute to the common effort those abilities which are especially his.

There should be no conflict between individualism and skill in working in groups. On the contrary, skillful democratic leadership fosters the expression of individual personality by creating opportunities for group members to make their maximum contributions and obtain maximum personal satisfactions.

2

developing leaders on the job

Most people in positions of leadership today have learned most of what they know about being leaders from watching leaders ahead of them and from their own experience in organizations. Learning-by-watching-and-doing has always been the primary method of leadership training, and it probably always will be.

But it has risks. The possibility exists, for example, that an understudy will learn more bad habits than good ones if the model he is following is a poor leader. And a leader who is learning by trial-and-error can misinterpret his own experience and learn the wrong lessons from them. Perhaps the greatest risk of the learning-by-watching-and-doing method of training is that it will produce one-dimensional leaders who have learned the skills and information required for particular jobs, and perhaps some tricks and gadgets, but who have not acquired the understandings and insights about group behavior that give them a second dimension, much less the skill and desire to develop the leadership potential of others, that provide the third dimension of leadership ability.

These risks can be minimized, however, if leadership-training-on-the-job is carefully and consciously planned. The process starts with a systematic program of self-training by each group that is designed to bring out the leadership capacity of every mem-

ber. It continues through the selection, orientation, and supervision of designated leaders on the job.

group self-training

Group self-training means something more than the mere unconscious learning from experience that takes place as a matter of course. It means a carefully planned program of self-analysis in which the members of a group—a committee, board, staff, club, discussion group, class—look objectively and systematically at what they do. By consciously observing the effects of different actions and procedures on individual members and the group as a whole, each member begins to understand better the underlying forces that cause groups to act the way they do. Out of this understanding flow better ways of working and more efficient use of each member's talents. Each member becomes better able to share the leadership load. In this situation every member is, in effect, a leader-in-training. And every group becomes a *training* group as well as a *doing* group.

Can every kind of group do self-training? Probably no group is incapable of engaging in self-training because of size, composition, or purpose. Programs of self-training have been carried on successfully by the executive staffs of industries, social agencies, government departments and commissions; operating committees of a variety of organizations; discussion groups; and legislative bodies of voluntary associations, to cite a range of examples.

Doesn't self-training interfere with getting the job done? Without doubt a group must set aside some time from its main work to engage in self-training. This may mean that during the first few meetings in which it does self-training it will get less "produc-

tive" work done. But it has repeatedly been the experience of groups that have engaged in self-training that after the first few meetings they are able to work so much more productively that the time they lost in the early stages of training is made up rapidly. In the course of a whole year of work, the group that has done self-training will probably accomplish a great deal more than a group that ends its year working in the same way as when it began.

The following steps in self-training may serve as a guide in developing a program of group self-training:

1. *Get the agreement of the group to engage in self-training.* Although it is possible for a leader to use some of these methods of analysis by himself without consulting the other members, he will be limited to his own perceptions and will be unable to verify or correct them by comparing his perceptions with those of others. The effect of the training is multiplied many times if it is a total group project, because all the members are learning as well as the leader. In presenting the idea to the group, these are some of the points it might be well for a leader to make:

"The purpose for doing self-training is to improve our efficiency in making decisions and doing our work, to increase the pleasure and satisfaction of working together, and to give us all a better understanding of leadership and group behavior that is generally useful.

"The social sciences have been devoting a lot of attention to this subject lately and have developed many tools and resources we can use. Furthermore, a number of groups have done this before us successfully.

"Though it will take some time away from our main work at first—perhaps twenty to thirty minutes each meeting—it will take a decreasing amount of time as we go along. And within a few meetings we shall more than make up for this loss of time through increased efficiency.

"In a sense, I am asking you to help me become a more effective leader, but in the course of doing this we shall all be learning how to work more effectively together.

"This will not be a formal training program, with a teacher, lessons, and homework. Rather, we shall be training ourselves on the basis of the experiences we have as we do our main work.

"The training activity will consist largely of our collecting information about how we operate, by simple questionnaires, by having different members of our group sit aside as observers, and by other means. Then, on the basis of this information, we shall be able to detect certain inefficiencies in our work habits and to figure out better ways of doing things."

2. *Identify the problems the members feel exist.* This is not an essential step, but it can be helpful in getting the members to start thinking about the processes of group operation. Typically, they will have formed such a strong habit of thinking only about the *content* of their work (*what* they are saying or doing) that they will find it difficult at first to start being conscious of the *process* of their work (*how* they are discussing or acting).

A "problem census" can be taken in very few minutes by asking the members to cluster into little groups of three or four, just as they are sitting,

designate one of their number to serve as spokesman, and then list four or five problems or obstacles they feel prevent groups in general (or this one in particular) from working as smoothly and efficiently as they might. As the spokesmen of these small clusters report, a master list can be constructed on a blackboard.

These listed problems become, in effect, the starting objectives for the self-training program. The members are saying, implicitly, "We want to eliminate these problems from our groups." It may be desirable, if time is not too pressing, to translate the problems into explicit objectives either in general group discussion or by having a committee work them into a statement of objectives for the next meeting. To illustrate, the problem "Some people talk too much" might be translated into the objective "To develop better participation among all our members."

This process can be taken a step further, possibly even at a later meeting, by asking the members to define the standards they would like to have maintained in their group. This can be done by asking the members, again in informal clusters, to list the things the leaders and members do that they (1) like them to do, and (2) don't like them to do. This then becomes a check list of "do's and don'ts," or standards, against which the leader and members can test their conduct in future meetings. Such a list should be revised from time to time, since the group's own perceptions of desirable behavior may change with experience.

The process of defining problems, objectives, and standards has several important effects. It helps to get the group into a frame of mind favorable to training, since it makes them conscious of present

inadequacies and possibilities for improvement. It also helps to chart the direction of the training and to provide yardsticks for measuring progress. But the most interesting effect is that it is in itself a subtle training experience. The simple act of becoming aware of problems they are causing or standards they are violating tends to influence people to behave differently.

✓ Care should be taken to keep the identification of problems objective and impersonal so that it does not result in destructive criticism of individuals. There is no blame attached to having some shortcomings of skill in group leadership or membership participation, but these are skills which can be learned. The leader can communicate to the group an attitude of not being defensive about his own shortcomings which will make it easier for the members to look at their behavior objectively. The focus of attention must be kept on the group process and away from the personality problems of individuals, since this is a training group, not a therapy group.

✓ 3. *Organize the self-training procedures.* The procedure of self-training involves two phases that are repeated continuously: (1) collecting information about the group's operation, and (2) analyzing this information and planning improved ways of working on the basis of it.

One way for the group to collect information about its operation is through objective observation. The job of observing how a group is functioning and reporting back information that will help the members to improve their ways of working can be performed by any member of the group. Until the group as a whole has gained some experience with this type

of observation, however, it is advisable to designate certain members as an observing team, who can train themselves by reading and practice to perform the observer role effectively. A convenient check list and other forms to guide the observing teams in making their observation are suggested on pages 54 to 55.

Many groups have found it helpful to instruct an observer to feel free to interrupt at any time to make observations about what is happening. For example, an observer might report that the group seems to be going off on a tangent and ask the others if they concur. If so, do they want to do something about it? Or an observer may ask whether there seems to be a need for authoritative information on the point under discussion. Or he may point out that the majority of the members are not taking part in the discussion and ask the total group what the reasons might be. The whole group can then discuss the observations and decide what to do. Perhaps the group was not aware they were going off on a tangent, for instance, and will now get back to the main track; on the other hand, they may decide they find the tangent a more rewarding topic of discussion.

Sometimes a group, to save time, will ask observers to withhold observations until a designated period in the middle or at the end of the meeting, or both. It is usually understood, however, that at any time a member feels that the group is not making the progress it should, he may ask an observer to report.

It is crucial that in making their reports back to their group, observers avoid damaging the group's morale or blocking its progress. The following tips¹ may be helpful in this regard:

¹ Adapted from Leland P. Bradford, et. al., "How to Diagnose Group Problems," *Adult Leadership*, December, 1953, p. 19.

Be sensitive to what information the group is ready to use—what will be most helpful to the group now, rather than what was the most interesting point observed.

Don't avalanche the group with information. If too much information is given it can't be used. Select only two or three observations which will stimulate thinking and discussion. Let the group ask for more information as they need it.

Don't praise the group too much. Learning doesn't take place by being told only pleasant things. Mentioning accomplishments is desirable if it helps the group face difficulties honestly and constructively.

Don't punish or preach or judge. The observer's role is not that of expert and judge, but is that of questioner and fact giver. He says, "My records show that eight people have not participated so far; is that desirable?" He does not say, "John and Mary are dominating the discussion."

Go light on personality clashes. It is usually better to discuss what helped and what hindered the whole group.

Another way for a group to collect information about its operation is to ask the members directly for it, by setting aside a period of time at the end of a meeting for a *general discussion* of what happened at the meeting, what might have been done to make it go more smoothly and efficiently, and how the next meeting can be better conducted. Or each member can fill out an *evaluation questionnaire* (see pages 55 to 56 for examples) at the end of the meeting, the results of which can be reported and discussed at the beginning of the next meeting. A third method is to have the entire group periodically (perhaps two or three times a year) rate itself with the *Group Efficiency Scale* suggested on pages 56 to 60, with a full discussion of the findings after they have been tabulated.

It is a fairly common occurrence for groups to become less and less dependent upon self-conscious procedures such as the use of questionnaires as they

gain experience in self-analysis. Increasingly, members of the group will spontaneously make their own observations, and the group will more or less automatically diagnose its problems and improve its procedures. One fact should be borne in mind in this regard, however: when very many new members enter a group, as is typical at the start of a new year, it becomes in many respects a new group that requires another program of self-training.

the role of selection in the training process

Typically in organizational life there are a number of titular positions—president, vice-president, secretary, committee chairmen, executive, adviser, department head, discussion leader, and the like—requiring designated leaders. Although the process used in selecting these designated leaders does not appear on the surface to be a form of leadership training, it has a training effect. The methods used in choosing leaders and the qualities that are consciously or implicitly extolled tend to set the standards which those aspiring to leadership try to develop. For instance, if leaders are selected by popularity poll, potential leaders will tend to develop those qualities which will make them popular. On the other hand, if leaders are selected by the nod of some powerful person the aspirants will try to develop those qualities which will attract his attention and favor.

The process of selecting leaders can be made an effective tool of leadership training if the criteria by which leaders are chosen are explicit and widely discussed. In fact, if once a year a group should invite all its members to participate in a re-examination of the criteria for selecting their leaders the effect

would be to clarify in all the members' minds the kinds of leaders they want to have and want to become. The criteria of selection become, in effect, the goals of training.

Certain general criteria, such as "dedication to the purposes of the organization," "ability to work with people," "time and energy for the job," and "willingness to share responsibility," apply to all leadership positions. More specific criteria, such as "ability to lead discussions," "ability to keep minutes," and "ability to keep financial records," vary with particular positions.

Perhaps the most difficult problem in selecting designated leaders is obtaining adequate information about individuals so as to be able to judge which ones will best meet the criteria. Fortunately, the process of group self-training helps to solve this problem, since the group itself is constantly collecting information about the leadership abilities of all its members.

the orientation of new leaders

The process of inducting new leaders into their jobs can be a routine ritual, or it can be a valuable training experience. Its educational value will be enhanced if it contains as many of the following elements as are relevant in a given situation:

1. A briefing on the purposes, history, organizational structure, personnel, and current goals of the organization.
2. A discussion of the principles of democratic leadership.
3. An analysis of each leader's duties, responsibilities, authority, and relationships.
4. A review of the experience of each leader's

predecessor (it should be a part of each leader's job description that he prepare a report and packet of materials for his successor).

5. An opportunity to plan with other leaders regarding joint activities, emphases, communications, and relationships.

How well a new leader is oriented will largely determine how secure he will feel in his job, how free he will be to share responsibilities with others, and how well he will fit into the total pattern of the organization.

training through supervision and consultation

Leaders almost always have some kind of supervisory relationship with someone. It may be the kind that is implicit in the relationship of the president of an organization to committee chairmen and other officers. Or it may be the more explicit kind that exists between an executive and his staff or a professional group worker and volunteer group leaders in an agency. In either case, the relationship may be passive and almost unconscious, with the leader being confused about whom he should turn to for help and guidance, or it may be a very directive do-it-my-way kind of domination. Neither of these extremes will result in much personal growth, which is the aim of leadership training.

No doubt there is a reluctance on the part of many organizational leaders, especially in voluntary associations, to perceive themselves as having a supervisory relationship to other leaders. And there is an equivalent resistance on the part of the leaders to being "bossed." But this reluctance and resistance stem from a stereotype of the supervisor as a superior authority that has been inherited from earlier,

more autocratic, days. The modern notion of supervisor places him more in the role of consultant than of boss. The supervisory relationship is a helping relationship, characterized by mutual respect, a spirit of co-operation, and joint decision making. The supervisor is a resource person, available to help other leaders with information, with experience, with moral support, and as a sounding board. But he doesn't shy away from his responsibility to help other leaders grow. He recognizes that he has an essential role in the process of leadership development.

Supervision often takes place on the run, as when a committee chairman asks the president's advice on a problem during the five minutes they are waiting for the board to assemble, or a church club leader calls the minister on the phone, or a volunteer club leader stops for a few minutes at the group worker's desk on his way to lunch. These situations are often among the most "teachable moments" in leadership training because the leaders have real problems and are actively seeking help. But a supervisor who wants to help other leaders grow in all dimensions will, in addition, schedule longer, more leisurely supervisory interviews in which deeper understandings and insights can be developed than is possible on the run.

Under whatever circumstances supervision takes place, it will probably result in the greatest development of leadership ability if it follows such principles as these:

1. The supervisor recognizes that each leader is different and has different ways of doing things. He will encourage all leaders to be themselves and will refrain from trying to impose his own—or any other foreign—work habits, style, or tempo on them.

2. The supervisor establishes a climate of warmth, respect, freedom from tension, and mutuality of helpfulness in his relationship with those whom he supervises.

3. The supervisor encourages each leader to work out his own solutions to problems and refrains from solving the problems for him. He may guide the leader, however, in the process of defining the real nature of a problem, diagnosing its causes, getting facts about it, examining various possible solutions, and choosing one to try.

4. The supervisor helps the leader to accept problems as normal in group life and as opportunities for learning.

5. The supervisor shares what knowledge and understandings he has about individual and group behavior in relation to the leader's problems, and suggests resources they both might tap to gain further understanding.

6. The supervisor helps the leader to set his own goals for his own development and performance, and to evaluate his progress toward these goals periodically.

7. The supervisor recognizes that he has personal needs of his own, and that these must not be allowed to get in the way of the personal development of other people.

Organizational leadership (in this connection, the supervisors) is, of course, responsible for getting jobs done, and it will be concerned with improving constantly the content, skills, and mechanics required to do the jobs. But in the long run the health and welfare of an organization is more likely to be enhanced

if its leadership gives its major attention to the growth and enrichment of persons, and especially to the development of the general leadership abilities—in three dimensions—of its members.

3

developing leaders in workshops

A workshop is a concentrated sequence of activities, ranging in length from one evening to several weeks, designed to develop specific skills, bodies of knowledge, and other learnings by trainers and trainees working together on particular problems. It emphasizes *active* learning—learning by doing. It is keyed to the problems and experiences of the participants and involves them intensively in the planning and operation of the whole program. In the workshop way of learning, the leader-in-training is given a high degree of responsibility for determining what and how he himself is to learn. As a result, he is likely to learn more and what he learns tends to become a more permanent part of his personal equipment.

some questions about workshops

✓ *When is a workshop appropriate?* There are few times when a workshop is *not* an effective means of leadership training—such as when the purpose is straight indoctrination or information giving, or when it is impossible to bring the trainees together. It is most appropriate when there is a group of about a dozen or more individuals with a common interest in improving specific or general leadership abilities.

Who should participate in a workshop? Workshops can be designed for almost any grouping of people. Some workshops are planned to improve the leader-

ship abilities of all the members of a single group, leaders and members together. Others are for all the leaders in a given institution—such as the board of trustees, committee chairmen, volunteer leaders, and teachers of a church. Still others are designed for the leaders of several different organizations or for particular kinds of leaders, such as a workshop for presidents, a workshop for program chairmen, and the like. Which grouping would be the best in a given situation depends entirely upon the unique requirements of that situation and the nature of the resources that are available. In most cases the decision is probably made on the basis of the readiness of a particular grouping to enter into training.

When is the best time to hold a workshop? Many organizations find it most effective to schedule a workshop at the beginning of a program year or at the end of a program year in preparation for the next year. In this way, a new leader is trained before going onto the firing line. An equally good case can be made, however, for holding a workshop in the middle of the year, after the leaders have had problems and experiences that can provide clinical material for the workshop. Perhaps the ideal solution is to have workshops at the beginning, in the middle, and at the end of the year; and a number of organizations do this. Very often the decision about the specific time hinges on when a given group of trainees will be free to give the time or when resource people or facilities will be available. And there is probably no *wrong* time for a good leadership training experience!

How long should a workshop be? The more time that is spent in leadership training the more extensive

and the deeper the training can be. A very short workshop (say for a single evening) can hope to achieve only very limited objectives, such as clarifying organizational purposes, developing elementary ideas about shared leadership, and perhaps learning some simple tools for self-training on the job. In many cases this may be the only thing that is practical, and it is certainly better than no training at all. Week-end workshops, which are becoming increasingly popular, provide time for fairly well-rounded and significant training experiences. Another popular pattern is the workshop that meets once a week, morning, afternoon, or evening, for several weeks, or one full day a month for several months. Many organizations find that vacation workshops of a week's duration or more in the summer are both effective and popular.

What resources are needed for a workshop? Successful workshops have been held under a wide variety of conditions and both with and without outside experts. The best physical facilities for a workshop provide one comfortable meeting room for the entire training group and several smaller rooms for work groups of from six to twenty or more people. The rooms should permit an informal arrangement of chairs in a circle or around tables. The human resources required in a given workshop depend upon the nature of the workshop's purposes and the resources within the group itself. In general, a workshop requires at least one resource person who has skills as a trainer, and a subject matter specialist for each of the special subject matter areas that will be dealt with. Sometimes these resource people will volunteer their services or are in the group itself, but often they are available only for a fee. Since the

quality of the workshop depends a good deal on the ability of the resource people, serious consideration should always be given to providing funds with which to pay them. Other funds may be necessary for promotion, administration, facilities, literature, films, refreshments, or other needs.

Should a fee be charged? A case is often made for charging a fee on the score that if people pay for something they get more out of it. There is ample evidence, however, that people who are motivated to learn by a desire to do a better job will learn whether they pay a fee or not. Usually people are willing to pay for something they want. The only legitimate reason for charging a fee for a workshop is to provide funds for adequate resources, and this is reason enough.

Who should sponsor a workshop? Workshops can be offered under a wide variety of auspices. The sponsor can be an intergroup council within a single institution or an interagency council representing several organizations. It might be a special committee or the official board of an organization or an institution. It might be a particular group in an agency, with representatives of other groups being invited to participate. Many workshops are sponsored by educational institutions (such as universities) or agencies (such as adult education councils) for the leaders of various organizations in a community. The best sponsor for a given workshop is probably the one that will command the greatest respect, provide the best resources, and achieve the greatest involvement on the part of the particular people for whom training is desired.

steps in organizing a workshop

There is no standard blueprint for leadership training workshops, but it is possible to suggest a sequence of steps in planning that may be helpful:

1. *Obtain, if necessary, appropriate authorization to conduct a workshop.* In many cases the sponsorship of a workshop is a matter of organizational policy, perhaps to the extent of committing certain resources, and accordingly should have the approval of the board of directors or other appropriate policy-making body. The authorization should state the general purpose of the workshop, the nature of delegated authority, and limitations, if any, of the planning committee.

2. *Select a workshop chairman.* The workshop chairman should be someone who is willing to share as widely as possible the tasks of planning and who will be able to inspire the widespread participation necessary to a good workshop.

3. *Appoint a planning committee.* The members of the planning committee might be appointed by either the policy body or the workshop chairman. In general, it is desirable for the planning committee to include the minimum number of people—preferably not more than a dozen—who can supply the following needs:

- a. Representation of the major types of groups, subject interests, and leadership roles from which the trainees will be drawn
- b. Abilities and skills needed in the planning and management of the workshop, related to promotion and publicity, discussion leadership, physical arrangements, use of visual aids, registration, reporting, and evaluation.

4. *If possible, select a training consultant.* A professionally trained “outside” consultant can be very helpful if one can be obtained. He is a specialist in the processes and methods of training. Though the planning committee is wholly responsible for determining *what* the training should be for (the objectives), it can delegate a good deal of responsibility to a training consultant for determining *how* it can best be done.

Training consultants with varying degrees of professional background can be found in most communities in the country. They may be group workers in social agencies such as the YMCA, YWCA, Council of Social Agencies, Boy Scouts, Girl Scouts, Red Cross, Jewish agencies, and the like. Or they might be found in a public school, library, university, industry, or agricultural extension service. Sources of information about consultants are listed on page 61.

If an outside consultant is not available, however, any experienced leader should be able to carry on in this role by using the planning process suggested below.

steps in planning and conducting a workshop

The larger and more complex a workshop is in terms of time, variety of program, and number of people participating, the more involved and time consuming the planning process will be. A small, short-term workshop may be able to skip over some of the steps suggested below, but the planning committee for a large training conference may need to subdivide the tasks further. The outline below is intended to suggest an orderly sequence of steps or tasks for the general guidance of a planning committee.

1. Formulate the policies and objectives of the workshop
 - a. Define the general purpose and character of the workshop; choose a theme, time, and place
 - b. Decide on the scope of attendance and establish criteria for extending invitations
 - c. Obtain information about the needs, interests, and problems of prospective participants (see pages 41 to 44)
 - d. Set the specific objectives of the workshop (see pages 44 to 45)
2. Appoint any of the following committees that are necessary and define their tasks:
 - a. Program
 - b. Local arrangements
 - c. Promotion and publicity
 - d. Registration
 - e. Recreation and social activities
 - f. Exhibits and materials
 - g. Reports
 - h. Evaluation
3. Develop a workshop design (see pages 37 to 40) and arrive at the following decisions:
 - a. Specific purpose, method of treatment, and resource personnel (speakers, panel members, etc.) for each general session
 - b. Purpose, size, composition, leadership, and resource personnel for small work groups
 - c. Materials (background papers, bibliographies, kits of pamphlets, discussion guides, etc.) to be sent to participants and leadership teams for preparation in advance or for distribution at the workshop

- d. Plans for preworkshop training of leaders, resource persons, and recorders
 - e. Plans for reporting and evaluating the workshop (see page 56)
4. Assign committees or individuals clear tasks and schedules for carrying out the decisions above.
 5. Conduct a preworkshop training (or briefing) session for workshop leaders, including the following elements:
 - a. Introductions of people present and their roles
 - b. Explanation of the purpose, plans, and design of the workshop
 - c. Separate meetings for each type of leadership personnel (discussion leaders, recorders, resource persons, general sessions chairmen, etc.) to be briefed on their particular responsibilities and to plan how they will work
 - d. Reports made to all leadership personnel of the plans made in the separate meetings
 - e. Meetings of the leadership teams of each work group and each general session to plan together and, if necessary, to rehearse
 6. Following the workshop have a meeting of the planning committee—preferably with the policy body of the organization—to review the workshop experience and analyze the implications of the evaluation of this experience for future workshops and the general development of the organization.

designing a workshop

The two principal elements in a workshop design are general sessions and work groups. Other possible elements include field trips, exhibits, counseling interviews, and recreational activities. A design consists of arranging these elements in a pattern or

sequence so as to bring about the desired learning most effectively.

GENERAL SESSIONS

General sessions, in which all participants in the workshop are assembled in one place, serve three purposes: (1) orienting the trainees to the purpose and plan of the workshop and making organizational decisions in which all participants should be involved; (2) presenting factual information, systematic statements of theory, inspirational messages, and other experiences that should be common to all participants; and (3) providing intercommunication between the work groups, the workshop management, and the total participant body. A wide variety of methods that can be used in general sessions are described on pages 45 to 54.

✓ WORK GROUPS

Work groups might be of several types and might range in size from a handful of people to fifty or even a hundred. The most common types of work groups are as follows:

Skill-training work groups, into which participants are divided according to the specific skills they wish to learn or practice, such as program planning, discussion leadership, working with committees, or using visual aids. This type of work group usually has a planned program under the direction of a trainer.

Problem-solving work groups, into which participants are divided according to particular problems they wish to work on together, such as planning new approaches to the selection of officers, the recruiting of members, or better ways of interpreting to the

public. These groups usually do not have a pre-planned program, although they might well build an agenda, and their leadership may or may not come from within the groups themselves.

Project or production work groups, into which participants are divided according to their wish to take part in planning and carrying out certain projects on behalf of the total workshop, such as putting on a demonstration, producing a role-playing scene, publishing a newsletter, or preparing a final report. These groups may or may not have trainers assigned to them.

Laboratory work groups, into which participants are usually divided at random to gain experience in self-training such as is described in Chapter 2.

Application work groups, into which participants are grouped according to the kinds of leadership roles they perform on the job, such as presidents, program chairmen, youth group leaders, educational group leaders, and the like. The purpose of these groups is to plan how the learnings derived from the workshop can be best applied in their particular positions.

Subject-interest work groups, into which participants are divided according to their interest in special subject-matter areas, such as public affairs, home and family living, religious education, music, and the like. These groups are usually led by a specialist in the subject field and have as their purpose the broadening and deepening of the participants' knowledge of a particular subject.

SOME SAMPLE DESIGNS

For example, these elements might be arranged into a design for a three-hour workshop as follows:

Opening general session (1 hour)

- Explanation of purpose and plan of workshop

- Identification of problems of leadership that concern participants (Audience subgroups—see pages 46 to 47)

- Analysis and categorization of problems by a panel (see page 51)

Problem-solving work groups (1 hour)

- Each work group develops suggested solutions for a different category of the problems identified in the opening general session

Concluding general session (1 hour)

- Spokesmen for the work groups report their findings

- Summary statement of principles and practical application by an experienced leader

Or if an entire week end is available, more elements could be introduced, such as the following:

First day

- Opening general session (orientation and problem census)

- Problem-solving work groups

- General session (reports of problem-solving work groups)

- Skill-training work groups

- General session (reports of skill-training work groups and demonstration or film—see pages 38 and 49)

Second day

- General session (informational or inspirational address—see page 50)

- Subject-interest work groups

- General session (reports of subject-interest work groups)

- Application work-groups

- Concluding general session (reports of application work groups and summary statement)

If several days are available for the workshop, a typical design would be to have general sessions the first hour of each morning, laboratory work groups the next two hours, a choice of different kinds of work groups in the afternoon, and general sessions in the evening. In this case, the last day is often devoted to work groups and general sessions on back-home application.

4

methods for leadership development

A beginning principle in planning any adult educational experience is that it should be based on the needs and interests of the learners and should deal with their real problems. Asking the trainees to identify their needs and interests involves them in the planning process, stimulates them to start thinking in advance about their problems, and assures their interest in the program.

methods of finding needs, interests, and problems

Interest-Finder Questionnaires. There is no standard questionnaire that is best for all leadership training programs, since there is a wide variation in the situations in which leaders work. Each planning committee should, therefore, construct a questionnaire that will get from potential trainees the information most directly relevant to the purpose and population of a particular program. In making up a questionnaire it may be helpful to keep in mind the following guiding principles:

The simpler the questionnaire is, and the easier it is to fill out and return, the higher percentage of return you will get. Therefore, ask only for essential information. Eliminate all questions that are not absolutely necessary.

The more questions that can be answered by checking a list of alternatives the easier the answers will be to tabulate and interpret. But provision should always be made for the respondent to write in alternatives other than those given.

The purpose of the questionnaire should be clearly stated, and the results should be reported back to the respondents

with an explanation as to how the information has been used in planning the program.

Questions should be clear and easily understood, and should invite specific rather than abstract answers. They should ask for the respondent's own ideas, not for those of people in general.

Interest questionnaires may range from a simple postcard to a several-page form. The two examples below illustrate the kinds of information that can be obtained.

POSTCARD INTEREST FINDER

(A covering letter should explain why the information is sought and how it will be used.)

Dear (Workshop Chairman):

I am am not interested in attending a leadership-training workshop.

I want to learn more about: (Number in priority)

....Leadership techniquesUsing visual aids

....Program planningSocial action

....Leading discussionsLarge meetings

....PublicityMoney raising

....Other:

My chief problems as a leader are:

.....
.....

I prefer the meetings to be on: (give 1st and 2nd choice) Mon..... Tues..... Wed..... Thur..... Fri..... Sat.....

My leadership responsibilities are:

Name

Address

INTEREST QUESTIONNAIRE

WHAT DO YOU WANT TO KNOW ABOUT LEADERSHIP?

Our Board of Directors would like to know whether or not you would like us to sponsor a leadership-training workshop

this spring, and if so, what you would like it to do for you. So will you please send us the information requested below, in the enclosed envelope, today?

1. I would like to attend a leadership-training workshop: Very much.... Perhaps.... Not at all.....

2. I would like to learn more about: (Number in order of preference)

-Theories of group behavior and leadership
-Principles of sound organization
-How to recruit and train other leaders
-What materials, films, speakers, and other resources are available for programs
-Taking action in the community
-Planning educational programs
-A particular subject-matter area (specify):.....
-
-Other:

3. I would like to improve my skills in : (Number in order of preference)

-Working with committees
-Leading discussions
-Conducting business meetings
-Supervising other people
-Being an officer (Specify office:)
-Arousing and maintaining the interest of members
-Promotion and publicity
-Planning programs
-Using films and other visual aids
-Raising money
-Evaluating programs
-Other:

4. My chief problems as a leader are:

5. The thing I would most hope to get from a workshop is:

6. My previous training and experience as a leader is: ...

7. The time I would prefer for the meetings is: (Give 1st and 2nd choices) Mon..... Tues..... Wed..... Thus..... Fri..... Sat..... Time.....

8. My present leadership responsibility is
.....
NAME
ADDRESS

Interviews. Instead of asking potential trainees to take the trouble to fill out questionnaires themselves, the same information can be obtained from them by having members of the planning committee ask the questions in interviews, either face to face or by telephone. The disadvantage of this method of getting information is that it takes more time. Its chief advantages are that it results in a higher proportion of response and fuller information.

Group Discussion. Sometimes, as in the case of clubs in a YMCA or a church, it is possible to have the groups whose leaders and members will be attending a workshop discuss the needs and problems with which they would like the workshop to deal. This might be a simple problem census, in which the groups are asked to identify the chief problems or obstacles they sense in the operation of their group (in which case the audience subgroup technique described on pages 46 and 47 is probably the most efficient method). Or it might be a full discussion of questions like those asked in the interest questionnaire.

formulating objectives

✓ A statement of objectives, which describes what outcomes the workshop is going to try to achieve, serves as a guide to the planning committee and the training personnel and helps make the expectations of the trainees realistic. The objectives should be based on the needs and interests of the trainees, but

also must take into account the needs of the agency or organization in which the leaders do their work.

Since all education is for the purpose of achieving certain changes in people, such as developing new knowledge, understandings, skills, attitudes, interests, or values, the objectives of a training program should specify what changes will be sought. For example, a statement of objectives for a week-end workshop might read somewhat like this:

The Leaders' Workshop will seek to develop:

Knowledge of the modern findings of research regarding group behavior and democratic leadership;

An understanding of how this knowledge can be used in certain practical situations;

Skill in planning group activities, presiding at meetings, working with committees, leading discussions, training other leaders, and evaluating programs;

Attitudes of concern and respect for people and sensitivity to their needs and feelings;

Knowledge about the pamphlets, books, films, and other resources available for group programs.

methods of presentation and audience participation ✓

Many of the objectives of leadership training can best be accomplished by presenting a common body of knowledge or experience to all participants at one time, as in a general session of a workshop. A number of methods are available, and it is important to choose the one that will most efficiently accomplish a given objective. For example, if an objective calls for the inculcation of a number of facts in a short space of time it would be wasteful to subject the participants to a "pooling of ignorance" in a group discussion. It would be much more profitable to have a lecture or films, possibly in conjunction with an audience reaction team if the material is very technical. On the other hand, if the objective requires a change

in attitude, presenting a lecture is likely to be wasteful. One seldom drops an old attitude until he has experienced greater success with a new one, and so the best method in this case would be one involving direct experience, such as role playing.

It is also generally true that people usually learn more when they have an active part in the process than when they are relatively passive. It is often possible to give members of a large audience fairly active roles even in a highly structured presentation, such as by organizing them into listening teams. Many of the methods of presentation and devices for obtaining audience participation described below can be combined so as to produce maximum training value from a single experience. The methods and devices are given in alphabetical order, with brief instructions and suggestions as to most appropriate use.

Audience reaction teams consist of two or three members of the audience who are asked to sit on the platform with the speaker to be on the lookout for points that seem unclear or confusing. At the conclusion of the presentation they ask for clarification and interpret the meaning of the presentation to them. This device is especially helpful when the subject matter is unusually difficult to communicate.

Audience subgroups are a method whereby a large group (varying from a discussion group to a lecture audience) is divided into small clusters or "buzz groups" of from five to ten people. They are given a specific assignment to complete in a short time, usually from five to ten minutes.

In using this device, the leader announces the purpose it is to serve, exactly how the subgroups are to be divided (for example, by tables, rows, sections of

rows, or just "with your nearest neighbors"), what problem they are to discuss, how much time will be allowed, and what they are expected to report. The leader will usually ask each group to name a spokesman as its first task. The groups then discuss until the leader signals that time is up, whereupon he calls on each spokesman to report for his group. In a very large audience he may call on only a cross-sectional sample of the groups to report. A recorder may summarize the main points on a blackboard.

Some of the situations in which this device has proved useful are the following:

In defining problems or questions. Frequently even a small discussion group will save time by dividing into smaller groups to isolate the problems with which its members are concerned. In large audiences the device may be used for listing the problems toward which it would like a lecture to be directed (problem census) or for framing questions for the speaker following his talk.

In developing a list of possible goals, standards, and activities for the consideration of the total group.

In refining ideas or developing solutions to problems. Different groups might be assigned different sets of ideas or problems. For example, listening teams (see below) might form audience subgroups, following a lecture, to refine their ideas about their reactions to the different aspects of the lecture they were assigned.

In polling audience opinion quickly. It is often desirable to know what the sense of the meeting is on a particular issue or point, and audience subgrouping provides a convenient way to get a more thoughtful reaction than is usually obtained by a mere show of hands.

Audio-visual aids include blackboards, motion pictures, filmstrips, exhibits, radio and television programs, recordings, models, charts, and pageants. They contribute to learning by stimulating interest, by appealing to a number of the senses, by concentrating a great deal of information into a concise

form, and by providing an experience that is common to all trainees. The following steps are involved in the effective use of audio-visual aids:

1. *Planning by the trainer.* The introduction of audio-visual aids into a training program should be planned as part of an integrated sequence of learning experiences. They seldom have learning value by themselves; they are supportive to other learning experiences. They should be used as *aids*, not as *teachers*.

2. *Selection of the appropriate aid.* The available aids should be carefully reviewed by the person who is going to use them, until he is completely familiar with their content and quality. Only those aids that are clear, simple, interesting, and to the point, should be used.

3. *Preparation of equipment.* All equipment should be set up and tested before it is used. For example, if films are to be used, the projector should be set up, focused on the screen, and put through a test run before the audience arrives.

4. *Preparation of the trainees.* Before a major audio-visual experience, such as a motion picture or recording, is presented the trainees should be briefed on why it is being presented and what they should try to get out of it.

5. *Recapitulation.* When a large amount of information is presented it will increase the aid's effectiveness if the major points are summed up afterward.

6. *Discussion of the information.* In order to be sure that the information presented by the aid is meaningful to the trainees it should be discussed by them and related to other aspects of their learning.

Case method involves the presentation of a description of an actual situation, including what people said, felt, did, and thought, in which a problem of leadership is depicted. The case may be presented either in writing, by tape recording, or in a skit. The trainees are then asked to tell what they would do if they were the leader (or perhaps some other group member) in this situation, and how they would go about doing it. The trainer never tells the trainees what to do or how to solve the problem, but asks

questions that cause them to examine their assumptions, become aware of their own attitudes and prejudices, sharpen their observations, and understand underlying forces in the situation.

Debates present speakers for and against a proposition, each side having a set period of time for developing its argument and a shorter period of time for rebuttal of the opponents' argument. This method is useful in sharpening issues, but there is constant danger that it will be dominated by the desire to win rather than the desire to find the truth.

Demonstrations show how processes actually operate or how skills are performed. A demonstration may be as simple as showing how a slide projector works or as complex as showing the decision-making process typically used by a committee.

Field trips have many of the same values and characteristics as audio-visual aids, with the added stimulation that comes from direct experience. A field trip should be planned in much the same way as an audio-visual experience.

Forums use the pattern of a presentation by a speaker, a symposium, a panel, a debate, or a motion picture, followed by questions and comments from the audience, with a moderator serving as middleman.

Group interviews may take one of three forms: (1) one person (an inquiring reporter) interviews several people; (2) several inquiring reporters interview one person; or (3) several inquiring reporters interview several people, all on the platform. This is a lively way to get out committee reports that would

be dull and monotonous if given in set presentations. It is also a good way to “pump” an expert in such a way as to be sure that his knowledge will be applicable to the problems and interests of a given audience. It is usually desirable that the interviewers have a general plan of questioning outlined in advance and that the persons being interviewed know what this plan is. But planning should not be so detailed as to destroy spontaneity.

Lectures are especially effective in summarizing a body of facts, in describing experiences, in presenting a systematic statement of principles, and in integrating complicated ideas and concepts into an orderly system of thought. They are also an effective way to transmit the vision, enthusiasm, and inspiration of one individual to a number of others.

The lecture is largely a one-way process, from speaker to audience, and can only in a very general sense take into account the needs, interests, and feelings of the trainees. It tends to put them into a passive role. This handicap can be partly overcome, however, by the use of such devices as listening teams, group interviews, reaction teams, and forums. A resourceful lecturer can even start with a list of questions or problems obtained from the audience (see audience subgroups) and build his lecture around them, thus involving the audience in the process from the very beginning.

If an outside speaker is to make his maximum contribution in a training program it is essential that he be properly briefed on the nature and purpose of the workshop, the needs, interests, and characteristics of the trainees, his assignment and its relation to the rest of the program, and the time schedule.

Listening teams are a way of assigning different sections of an audience (divided by aisles or other landmarks) different points to focus on while listening to a presentation. For example: one section might be asked to listen for points requiring clarification or illustration; another section, for points they doubt or wish to criticize; another section, for points that were omitted; and a fourth section might listen for ways in which the speaker's ideas might be applied to their situations. In the question period these listening teams, or their spokesmen, can be asked to report to the entire audience.

Panels are a form of presentation in which several people, usually with different points of view or backgrounds of information and experience, carry on an informal discussion under the leadership of a moderator. Though the members of a panel should have a clear idea of the purpose and direction of their discussion, and should understand the special contributions that each is expected to make, they will usually get over to the audience better if they are spontaneous and unrehearsed.

Problem census (see pages 19 and 46).

Role playing is a spontaneous acting out of a situation or an incident by selected members of a group or audience. It has been found especially useful in achieving the following four training objectives:

1. Developing insight into other people's feelings. Those who take roles find that they are actually able to experience what it's like to be another kind of person. Similar insights into feelings are gained by the observers of role playing, although perhaps not quite so deeply.

2. Developing an understanding of the forces in a

situation that block or facilitate good human relations. Role playing is an effective method for bringing highly charged personal emotions into an objective light. Everyone understands that the person who is playing a given role is not being himself but is representing a hypothetical character. It is possible, therefore, for the entire group to discuss his attitudes and actions without threatening anyone's self-respect or status.

3. Developing skill in diagnosing group problems. Different problem situations that are typical in groups, such as inadequate leadership, factionalism, or lack of clarity in goals, can be built into a series of simple role-playing scenes and the trainees can practice diagnosing the causes of the difficulty.

4. Developing skill in solving group problems. Role playing provides an excellent laboratory for testing ideas and plans of action for solving typical group problems.

Role playing is not a technique that requires highly trained leadership or dramatic ability on the part of the participants. It should never be used just for entertainment, however, but only for the serious purpose of accomplishing one of the training objectives listed above.

The following steps may be helpful to a trainer in directing a role-playing scene:

1. *Choose a situation.* The situation to be depicted should be one that is familiar to all participants, such as a committee meeting, a church board meeting, a staff meeting, and the like. The situation should be clear, specific, and not too complicated.

2. *Define the roles.* In some cases it may be sufficient merely to describe the attitude the role player is to take toward the situation being enacted, while in others it may be desirable to describe each character's social and economic

background, his general outlook on life, and other pertinent personality characteristics. Each role player must be clear as to what is expected of him.

3. *Choose the role players.* There are several ways to choose group members to take roles: have subgroups select representatives, ask for volunteers, appoint the role players arbitrarily, or use some device for selecting them by chance. Under no conditions must a person be selected because he fits a particular role, especially if it is unfavorable.

4. *Set the stage.* Role playing may require some simple physical properties, such as a table with chairs around it. The role players should be placed so that they will be clearly visible and audible to the audience. The psychological stage should also be set—the purpose of the role playing and the exact nature of the situation to be enacted should be fully explained.

5. *Prepare the audience to observe.* The audience should be coached on the specific behaviors, processes, or emotional reactions they are to look for. Sometimes it is useful to divide the audience into teams, each team to concentrate on observing a particular role player. It may or may not be desirable for the role players to be out of the room while these instructions are being given, depending upon whether such knowledge would prejudice their reactions in the role playing.

6. *Enact the scene.* It is usually desirable to allow the role players a few moments to think over their parts. But there should be no script and no plot; the role players should work out their responses as they go along, so that they will be spontaneous. The scene should be stopped as soon as the main point has been developed sufficiently to form a basis for analysis and discussion. Scenes usually run from five to twenty minutes.

7. *Discuss and evaluate the role playing.* It is usually rewarding to ask the role players to tell how they felt in their roles and how they reacted to the other characters in the drama. Audience teams may be asked to report their observations. Then the whole group should discuss the insights produced by the experience and their application to real situations.

Symposiums consist of presentations by two or more speakers, each with a different point of view or

area of content. Except for providing greater variety, the symposium possesses the same advantages and disadvantages as the lecture. The briefing of the speakers takes on added importance, since they must synchronize their material.

tools for group observation

1. *Suggested Check List for Group Observation.* There is a wide variety of facts that an observer could collect about any group, but he will be most helpful if he limits his reports to those facts that are relevant to its problems or its learnings at a given point of time. Listed below are some of the more important categories of information that it may be useful for the observer to keep in mind:

Goals. Has the group defined its goals? Do all members understand them and subscribe to them? Are they attainable? Are they *our* goals?

Progress. Are we working toward our goals or getting sidetracked? Are we moving fast enough? Too fast?

Procedures. Are we using the best methods of work? Are we using an orderly process of problem solving, moving from (1) defining our problem, to (2) analyzing all available facts about it, to (3) exploring all possible solutions, to (4) testing the solutions and choosing the best one, and then (5) planning ways to evaluate the results? Are we flexible in our way of working, choosing the best method for a given situation? Do we stick to traditional and formal procedures?

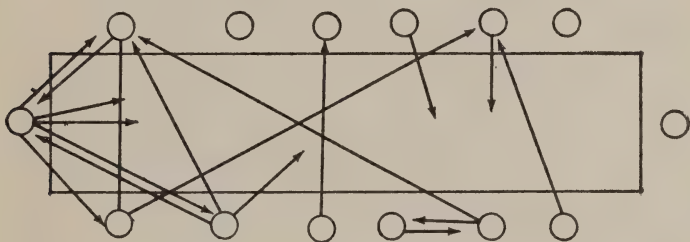
Climate. Is there a warm, friendly feeling in the group, or is it cold, formal, and tense? Do members feel free to say what they think?

Communication. How well does everyone understand what is going on? Are we wasting time quibbling over words? Are members really trying to understand each other's ideas?

Participation. Are all the members contributing, or does overparticipation by some keep others from participating? Are all the roles necessary to good group operation present or is some function not being performed? Are the contributions

relevant to the group's task or morale, or are they off the beam?

2. *Participation Chart.* It is often helpful to a group if an observer periodically makes a flow chart showing the number and direction of statements by the leader and members during short periods of discussion. Such a chart will show at once, as objective fact, which members are overparticipating and which are underparticipating.



PARTICIPATION FLOW CHART

(Arrows pointing to center indicate remarks addressed to the group as a whole)

evaluation questionnaires

Evaluation questionnaires may be designed to get several kinds of information from participants: (1) evidence about what is being learned; (2) evidence about the effectiveness of different methods and the trainees' feelings about them; and (3) suggestions for new goals and better methods. A questionnaire is likely to be most effective if the participants have a part in determining what information it will seek. It is usually desirable to tell the participants they do not have to sign their names.

In evaluating a single meeting a simple questionnaire might contain questions (with space for answers) such as these: How do you feel about this meeting? (Very good, good, fair, poor, very poor) What did you like most about the meeting? What did you like least about the meeting? What suggestions would you like to make for the next meeting?

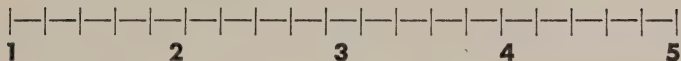
In evaluating an entire workshop a questionnaire might ask questions such as these: What was your purpose in attending this workshop? What did you hope to get out of it? What did you actually get out of it? Did the workshop cover all the points in which you were interested? If not, what were the omissions? Which general sessions were most valuable to you? Why? Which were least valuable? Why? Which work groups were most valuable to you? Why? Which were least valuable? Why? How will you make use of anything you have learned at this workshop? How might future workshops be made better?

group efficiency scale¹

The check list which follows will be most useful if a group discusses it before using it. It is not a test, but merely a guide for identifying problems that need group attention. A tabulation of opinions can probably most rapidly be accomplished by asking for a show of hands for each point on the scale and recording the tallies on a blackboard. One result of this process will be to indicate the wide range of feelings on some points and the unanimity of opinion on others. Discussion should center on the causes and solutions of the problems thus identified.

¹ Adapted from Ronald Lippitt and Alvin Zander, "Sharing the Leadership Load," *Adult Leadership*, June, 1952, pp. 14-19.

1. Do we plan our meetings in relation to our objectives?

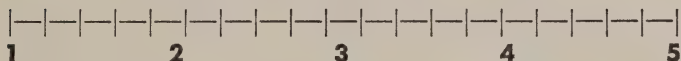


We never pre-plan a meeting in the light of its special goals.

We sometimes have a rough preplan.

We always pre-plan meetings and submit the plan to the group for approval.

2. Do we plan our meetings in relation to what members expect from them?

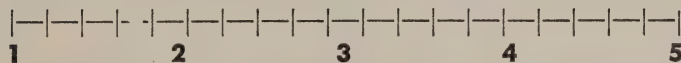


We have no way of knowing what members expect.

If members specifically request something it gets consideration.

We frequently find out what members expect before building our agenda.

3. Do we define or clarify our goals during meetings?

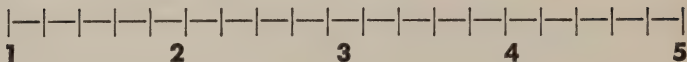


We never consider goals during meetings.

We attempt to define or clarify our goals when confusion is evident.

We frequently discuss and clarify our goals.

4. Do we summarize our progress from time to time?

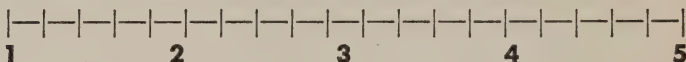


We don't take the time to take stock.

We examine our progress if someone requests it.

We frequently summarize what has been accomplished.

5. Do we use suitable methods of procedure?

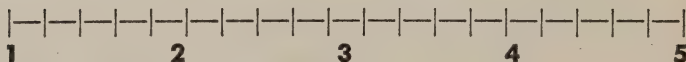


We use pretty much the same procedures over and over.

We think about the best procedures for handling some activities but not others.

We try to select the procedure most appropriate for accomplishing each goal.

6. Do we test for agreement to see if we are ready to make decisions?

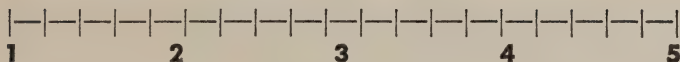


We usually call for a vote when anyone asks for it.

We sometimes take an informal poll to see if we're ready to make a decision.

We frequently test to see that everyone is satisfied that we are ready to make a decision.

7. Do we spread responsibilities throughout the group?

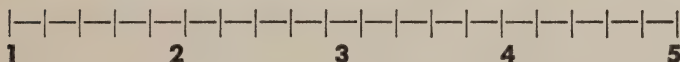


Most responsibilities are given to the leader.

Sometimes group members share in responsibilities.

Responsibilities are widely distributed throughout the group.

8. Do we have an atmosphere in which all feel free to express ideas and feelings?

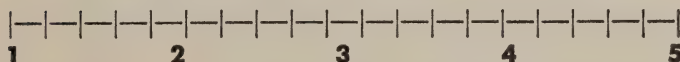


Our discussions are formal and only a minority participate.

Everyone talks but some subjects are taboo.

We usually have an atmosphere of free, spontaneous expression.

9. Do members exhibit a feeling of responsibility to restrict their contributions to those which are helpful to the group?

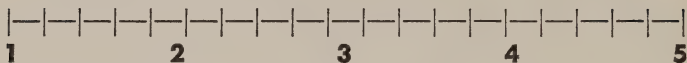


Members are "off the beam" frequently.

We wander about as much as the average group.

Members actively attempt to confine their contributions to relevant things.

**10. Do we evaluate the efficiency of our
methods of operating?**



We don't think
about how well
our procedures
are working.

We look at our
procedures only
when things go
wrong.

We systemati-
cally evaluate
procedures to
find out how well
they are working.

5

some resources for leadership development

There is a constantly growing list of varied types of available resources in the area of leadership development. Some of them are given in this chapter under the heads of summer training laboratories, speakers and consultants, periodicals, books, pamphlets, and films and filmstrips.

summer training laboratories

A number of intensive training laboratories, designed especially for trainers of leaders, are conducted in various parts of the country. Most of these laboratories are held in off-campus locations under university auspices for periods of two or three weeks in June, July, and August. Current information about these laboratories, including dates, locations, and tuition, can be obtained from the National Training Laboratories in Group Development, 1201 Sixteenth Street, N.W., Washington 6, D. C.

In addition, many colleges and universities have special seminars and institutes throughout the year on leadership training and methods of adult education. It may be worth while to write to the nearest state college or university to determine if it is sponsoring such a program.

speakers and consultants

Lists of trained consultants, speakers, and workshop leaders are frequently available from the train-

ing institutions mentioned above. In addition, the names of qualified local experts can frequently be obtained from local adult education councils, councils of social agencies, public libraries, and public school directors of adult education.

periodicals

There are four general periodicals dealing with leadership development and the study of groups. The first is designed for practitioners and lay leaders, while the other three are aimed more directly at professional workers or social scientists.

Adult Leadership (743 North Wabash Avenue, Chicago 11, Illinois, \$5 per year). Published monthly except July and August by the Adult Education Association of the U.S.A.

The Group (134 East 56 Street, New York 22, N. Y., \$3 per year). Published quarterly by the American Association of Group Workers.

Journal of Social Issues (Association Press, 291 Broadway, New York 7, N. Y., \$4 per year). Published quarterly by the Society for the Study of Social Issues.

Human Relations (Research Center for Group Dynamics, University of Michigan, Ann Arbor, Michigan, \$6 per year). Published quarterly by the Research Center for Group Dynamics and the Tavistock Institute in London.

books

Cartwright, Dorwin, and Zander, Alvin, Eds., *Group Dynamics: Research and Theory* (Evanston, Illinois: Row, Peterson & Co., 1953, \$6.00).

Dimock, Hedley S., and Trecker, Harleigh B., *The Supervision of Group Work and Recreation* (New York: Association Press, 1949, \$4.50).

- Frank, Lawrence K., *How to Be a Modern Leader* (New York: Association Press, 1954, \$1.00).
- Haiman, Franklyn S., *Group Leadership and Democratic Action* (New York: Houghton-Mifflin Company, 1951, \$2.50).
- Johns, Ray, *Executive Responsibility* (New York: Association Press, 1954, \$4.00). Ch. 18, "Understanding Authority and Leadership," pp. 205-216.
- Knowles, Malcolm S., *Informal Adult Education* (New York: Association Press, 1950, \$4.00).
- Liveright, Alexander A., *Union Leadership Training: A Handbook of Tools and Techniques* (New York: Harper and Brothers, 1951, \$2.50).
- Strauss, Bert, and Strauss, Frances, *New Ways to Better Meetings* (New York: Viking Press, 1951, \$2.95).
- Thelen, Herbert A., *Dynamics of Groups at Work* (Chicago: University of Chicago Press, 1954, \$6.00).
- Trecker, Audrey, and Trecker, Harleigh, *How to Work with Groups* (New York: Woman's Press-Whiteside Press, \$3.00).

pamphlets

- The Leaders Digest* (Chicago: Adult Education Association of the U.S.A., 1954, \$2.00). "The best of *Adult Leadership*, Vol. I."
- Lippitt, Gordon L., and Schmidt, Warren H., *My Group and I* (Washington: Educator's Washington Dispatch, 1952, 75 cents).
- Roethlisberger, F. J., *Training Supervisors in Human Relations* (Cambridge: Harvard Business Review reprint, September, 1951, \$1.00).
- "The Dynamics of the Discussion Group," *Journal of Social Issues*, Vol. IV, No. 2, 1948, \$1.25.

films and filmstrips

An increasing number of motion pictures and filmstrips designed specifically for training purposes are being produced. They range in subject from discussion leadership to supervision and from general principles of group operation to specific training techniques. Information about current films can be obtained from the following sources:

Adult Leadership, Attention: Resources Editor, 743 North Wabash Avenue, Chicago 11, Illinois.

Association Films, Inc., 347 Madison Avenue, New York 17, N. Y.

Association Press, 291 Broadway, New York 7, N.Y.

Center for Mass Communication, Columbia University Press, 1125 Amsterdam Avenue, New York 25, N. Y.

Coronet Instructional Films, Coronet Building, Chicago 1, Illinois.

Encyclopedia Britannica Films, 1150 Wilmette Avenue, Wilmette, Illinois.

Film Council of America, 600 Davis Street, Evanston, Illinois.

International Film Bureau, 57 East Jackson Boulevard, Chicago 4, Illinois.

McGraw-Hill Book Co., Inc., Text-Film Division, 330 W. 42 Street, New York 36, N. Y.

National Training Laboratories in Group Development, 1201 Sixteenth Street, N.W., Washington 6, D. C.

University of California Department of Visual Instruction, Los Angeles 24, California.

In addition, films are frequently available on loan from local libraries, public schools, colleges, and universities.

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MAR 8 60	JAN 7 75	
MAY 6 60	JAN 6 76	JUN 15 1986
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FACULTY	JAN 5 71	MAY 1 75
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